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ABSTRACT

Based on a review of the literature and interviews with the Real Estate Coordinators at six California community colleges, this report examines the objectives and content of continuing education curricula in real estate. After introductory material describing the role of continuing education in the statewide master plan designed to professionalize the real estate industry, the report discusses the legislative mandates requiring all California realtors to periodically prove their competency through examinations approved by the Continuing Education Unit of the State Department of Real Estate (DRE). The report then recognizes the cooperation between the DRE and the Chancellor's Office of the California Community Colleges which led to the development of approved titles, descriptions, and materials for continuing education courses to meet these legislative goals. Continuing education curricula at El Camino College, Cerritos College, Los Angeles Harbor College, Los Angeles Southwest College, Santa Ana College, and the San Diego Community College District are then described. For each college, the report enumerates the courses that are offered and discusses the institution's long- and short-range goals in the area of continuing education in real estate. Summary conclusions and recommendations are provided in the report. (JP)

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CONTINUING EDUCATION IN REAL ESTATE

IN

SELECTED COMMUNITY COLLEGES IN SOUTHERN CALIFORNIA

BY

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INTRODUCTION

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Statement of the Problem

Community colleges, a product of and for various communities, undergo constant change to meet current and future needs of people living nearby their respective campuses. In broad terms, community colleges' educational activities range from two-year transfer education to occupational education. An adjunct to transfer and occupational education within community colleges is community service programs to enrich and to help fulfill the needs for lifelong learning.

Demands for instruction providing Currency of Knowledge for technical and professional occupations pose new problems leading to a new stage of community colleges growth and development. Namely, the insertion of continuing education into regular occupational programs.

Real Estate programs in many community colleges include continuing education. Course outlines, contents, and instructors must be approved yearly by the Department of Real Estate (DRE) by way of California Community Colleges (CCC). Real Estate Coordinators are administrators of Continuing Education in Real Estate (CERE). Real Estate Coordinators serve as Verifiers of Attendance Certificates for CERE, maintain special records in compliance with California

Law, and make special reports to DRE by way of CCC. These new responsibilities are beyond the normal duties of Real Estate Coordinators.

Purposes

Purposes of this investigative paper are:

1. To identify the purpose of CERE
2. To identify the governmental agency responsible for CERE
3. To identify the classes of CERE sponsors
4. To examine the system of implementing CERE by CCC
5. To examine CERE programs in selected community colleges in Southern California
6. To identify common CERE problems among Real Estate Coordinators
7. To make recommendations for a smoother delivery of CERE

Method of Study

The method of study includes:

1. Collecting and reviewing literature from DRE, CCC, and the real estate industry
2. Interviews with Real Estate Coordinators at El Camino College, Cerritos College, Los Angeles Harbor College, Los Angeles Southwest College, Santa Ana College, and the San Diego Community College District

Scope of Study

The scope of this investigative paper is for educational usage. Values are as follows:

1. To share findings with Real Estate Coordinators and college administrators who are charged with the planning, organizing, staffing, directing, and controlling CERE
2. To provide a resource for future investigations
3. To direct attention to common problem areas associated with CERE
4. To make recommendations for the improvement of CERE within CCC.

Summary

In recent years, students and real estate licensees have been confused as to the requirements for professional growth and development of the real estate industry. Subsequent to the 1966 Real Estate Commissioner's "Blueprint for Professionalization Plan," revisions and updating occurred in 1968, 1970, 1972, and 1977. In 1970, the name was changed from "Blueprint" to "Plan for Professional Development of the Real Estate Industry." Even with the constant changes and requirements, the key ingredients of the Plan are yet leading to the achievement of professional status of real estate licensees. Professionalism is being achieved by:

1. Public Recognition
2. Statutory Education
3. Specialized Education
4. Continuing Education

The road to professionalization is long, and it must be traveled one step at a time. Between now and 1982, when most of the provisions of the current Plan could be in place and the continuing education requirement

is undergoing further scrutiny by the legislature, it is anticipated that whatever intermediate steps are taken be such that in no particular year would any applicant for broker or salesperson license see the requirements dramatically changed.[1]

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[1]California Department of Real Estate, Reference Book, pp. 79-80.

REVIEW OF THE LITERATURE

REVIEW OF THE LITERATURE

General

Due to the newness and the nature of CERE, authors, writers, and editors have yet to document and publish the full scope or a definitive evaluation of CERE for instructors and/or for students' usage. This document, perhaps, is the first publication drawing many factors of CERE together to help serve as the basis for future research.

Senate Bill No. 332

Prior to the enactment of Senate Bill No. 332 (SB 332), there were no regulations imposing CERE upon real estate licensees after issuance of a license. SB 332 was approved by California's governor on September 29, 1976. SB 332 was filed with the Secretary of State on September 30, 1976.[1]

This new law authorized the Real Estate Commissioner to adopt regulations imposing CERE of 45 clock hours of specified courses, seminars, or conferences per four-year period preceding renewal of licenses and to establish standards to assure reasonable currency of knowledge as a basis for a level of real estate practice. The results of CERE will provide a high level of consumer protection and service.

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[1]See Appendix A.

SB 332 authorized the Commissioner to establish application fees for approval of CERE courses and seminars in the amount sufficient to cover the cost of processing such applications. SB 332 prohibits, commencing on January 1, 1981, the renewal of an active real estate license, unless the applicant has completed the core requirements. CERE is operative until January 1, 1985. Article 2.5 of SB 332 was added to the Business and Professions Code. Article 2.5 required the Commissioner to adopt regulations by January 1, 1978.

CALIFORNIA BUSINESS AND PROFESSIONS CODE

California Business and Professions Code

Division 4. Real Estate

Part 1. Licensing of Persons

Chapter 3. Real Estate Regulations

Article 2.5. Continuing Education

Section 10170. The Legislature has determined that it is in the public interest of consumer protection and consumer service that all real estate licensees licensed under the provisions of this part comply with continuing education requirements adopted by the Commissioner pursuant to this article as a prerequisite to the renewal of real estate licenses on and after January 1, 1981.

Section 10170.4 Para. 2. In exercising the authority under this article, the Commissioner shall establish standards which will assure reasonable currency of knowledge as a basic for a level of real estate practice which will provide a high level of consumer protection and service. The standards shall permit a variety of alternatives of subject material to licensees taking cognizance of specialized areas of practice, and alternatives in sources of programs considering availability in area and time. The standards shall include, where qualified, generally accredited educational institutions, private vocational schools, correspondence institutions, educational programs and seminars of professional societies and organizations, other organized educational programs on technical subjects or equivalent offerings.

Section 10. The Commissioner shall before February 15, 1982, and again before February 15, 1983, report to the Governor and to the Legislature, the experience under this program for the prior calendar year indicating the number of licenses renewed and an

analysis showing the source of education presented by the applicant for renewal including: 1. educational programs and seminars of professional societies and organizations, 2. private vocational schools, 3. correspondence institutions, 4. the University of California, 5. the California State University and Colleges, 6. California Community Colleges, 7. other institutions of collegiate grade, 8. other organized educational programs on technical subjects, and 9. programs or work accepted by the Commissioner as equivalent.

Continuing Education in Real Estate Regulations

In compliance with Article 2.5, the Real Estate Commissioner adopted CERE standards in order for real estate licensees to keep abreast of current real estate data to safeguard the public when making real estate decisions.[1]

The Commissioner has the authority to approve courses, seminars, and entities offering CERE. The Commissioner will grant a license renewal applicant credit for attendance and completion of an offering if properly certified by an approved entity. Licensees are required to be in attendance at least 90 percent of the offering or 80 percent, provided the licensee has successfully passed a DRE approved written final course examination.

CERE is not:

1. General or statutory training to obtain a license
2. Business skills such as typing, speed reading memory improvement, language report writing,

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[1]See Appendix B.

advertising, and salesmanship psychology

3. In-house staff or employee training, sales promotion or other meetings held in conjunction with the general business of the licensee.

4. That portion of any offering devoted to breakfast, luncheon, and dinner or other refreshment

Continuing Education Unit - DRE

To administer CERE, the Real Estate Commissioner established within DRE a Continuing Education Unit. One of the documents released by the Unit is entitled "Questions and Answers."[2] This release contained information about SB 332 and the Commissioner's Regulation. In response to inquiries concerning CERE, the Continuing Education Unit issued general letters. Letters stressed "only offerings specifically approved will satisfy the 1981 renewal requirement."[3]

The California Association of Realtors released it in a magazine entitled "California Real Estate," dated March 1979, in an article by Mr. Paul R. Pope, Chief Deputy Commissioner, Course Approvals and Continuing Education, DRE.[4] Mr. Paul R. Pope cautioned licensees that only those courses specifically approved by DRE can qualify for CERE, and licensees

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[2]See Appendix C

[3]Ibid.

[4]Ibid.

should ascertain that courses and seminars are approved before taking them. In the same magazine, the 1978 edition of the "Plan for the Professional Development of the Real Estate Business" was presented.[5] Committee members of the Professional Development Advisory Committee are also listed.

The Continuing Education Unit provides each potential CERE sponsor with "Continuing Education Offering Approval Application,"[6] Attendance Control Card, and also suggest weaving into subject areas the Commissioner's Ethics and Professional Conduct Code, and Federal and State laws prohibiting discrimination in housing.

Chancellor's Office - CCC

Because of the SB 332 requirements placed on licensees before license renewal, some community colleges have been pressured to offer CERE.[7] Private real estate schools were first to offer CERE. In most cases, the cost of seminars were no less than $10.00 per clock hour. At $10.00 per clock hour, each licensee would be paying $450.00 for 45 clock hours of CERE. Many real estate licensees wanted to meet CERE requirements through the community colleges on a less costly basis.

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[5]Ibid.

[6]See Appendix D

[7]See Appendix E

Community Colleges could offer CERE on an individual basis by paying fees direct to DRE. DRE charges $150.00 for each course or seminar approved. For renewal of each course or seminar, the renewal fee is $100.00. The Chancellor's Office estimated that more than 100,000 students (real estate licensees) will need CERE annually.

The question was, should each community college pay separate fees for each and every CERE offering or should CERE cost be centralized at the Chancellor's Office? If centralization could be achieved, it would save CCC hundreds of thousands of dollars. Much negotiation occurred between CCC and DRE over fees for approved CERE courses and seminars. An agreement was reached. Rather than having each college to pay fees, CCC would organize a resource panel to develop course titles, descriptions and material. Once the application package was complete, CCC would pay the necessary fees to DRE and obtain approval. This one approval will serve all community colleges in the State, and no individual community college would have to go through DRE's review and approval process. The cost of CERE for CCC is paid for through the Community Colleges Real Estate Endowment Fund.

The Chancellor established within the CCC a Continuing Education Unit. Dr. John W. Strahl, Chancellor's Office and Mr. Don Helm, of the Community College Real Estate Printed Materials Depository are charged with the administration,

guidance, and support of CERE throughout the community colleges.

The Continuing Education Unit requires each Real Estate Coordinator to submit statements of assurances (CCC/CECA 1/79 and CCC/CETQ 1/79) for each course and seminar approval. Provider Numbers are subsequently issued to the Coordinator and the course(s) and/or seminar(s) can then be offered immediately.

In 1979, a representative of private CERE sponsors objected to CCC providing CERE. A possible justification for CCC's offerings in CERE is found in appendix F.

To aid and advise the Chancellor's Office, the CERE Community College Resource Panel was formed. The role and function of the Panel are as follows:

Mission:

To systematize a no cost/low cost CERE capability within community colleges of California to serve Realtors, Realtists, and non-realtors.

Long-Term Model for CERE:

1. The unique nature of CERE requires expert consultative service to CCC
2. CERE regulations place great emphasis or timeliness on consumer protection aspects for course offerings.
3. A geographically balanced resource panel from community colleges and their industry could render a most valuable service for CERE programs as coordinated by CCC

Design:

1. Six to eight community college real estate spokespersons from a geographic cross section of California will be named to the CERE Community College Resource Panel

2. Each community college representative will ask the local real estate board to name a member to serve in concert with community college coordinators

3. The Panel will:

   a. Consider any proposed CERE topics

   b. Propose topics

   c. Suggest continued worth of previously approved CERE courses from community colleges

4. Mix of available topics will include:

   a. Urban and Suburban

   b. Rural and Agricultural

   c. Industrial, Commercial and Investments

5. Balance of available community college courses as sponsored by CCC will have:

   a. Forty percent of the courses carrying 25 or more hours of CERE credit

   b. Sixty percent of the courses carrying 6 to 24 CERE credit hours

   c. Selected titles will be annually updated to reflect changes in laws, regulations or practices.

6. Each community college offering CERE will regularly and strongly be encouraged to include feedback evaluation concerning offerings. Suggested types would be:

   a. Student evaluations

   b. Evaluation by local real estate board members not enrolled in class

c. Local broker evaluations on sales forces' improved real estate capabilities resulting from CERE experience.

7. No Panel judgment will be promulgated regarding "no fee" vs "partial fee" vs "fully fee funded" CERE by any community college. Level of fees, if charged, could be recognized as having a range of levels. Exact amount of such fees would likely reflect varied costs of acquiring instructional skills of qualified presentors.

8. Local community colleges will be strongly encouraged to offer CERE courses during various hours of the instructional day rather than exclusively during evening hours

9. As a long-term goal, the Panel will seek to develop a modularized CERE package that would contain a series of provider numbers to be awarded to any student completing ninety percent of any module attendance or else passing the post test

10. Through CCC Staff, activities of the CERE Panel would regularly be reported on at least a quarterly basis to California Association of Real Estate Teachers (CARET), the Community College Real Estate Endowment Advisory Committee, the California Association of Realtors (CAR), and the California Association of Real Estate Brokers (Realtists)

The Resource Panel Members are:

Evelyn Daniel - Santa Ana College

Bill Dodd - Realist

Don Helm - Director, Real Estate Depository

Cecilia Hopkins - College of San Mateo

Robert Horovitz - Realtor

John Jurivich - Shasta College

Charles Mayfield - Los Angeles Southwest College

Toby O'Brien - Realtor

Don Osen - Realtor

Carlene Pollard - Realtor

Marjorie Reed - San Diego Community College District

Don Sheppard - Realtor
John Strahl - Chancellor's Office, CCC
Frank Strong - Sierra College
Dolly Toms - Realtor
Hugh Wilkoff - Cerritos College

FINDINGS IN SELECTED COMMUNITY COLLEGES IN SOUTHERN CALIFORNIA

FINDINGS IN SELECTED COMMUNITY COLLEGES IN SOUTHERN CALIFORNIA

General

For this study, Real Estate Coordinators provided information concerning CERE at their community colleges. Following is a brief summary of the newly implemented programs in CERE.

El Camino College

Mr. Frank Fowler, Real Estate Coordinator, indicated that his college is offering CERE courses and seminars as a community service for El Camino's public.

The college prefers to offer CERE courses. These courses include "Real Estate Investments," "Exchanges and Taxation," and "Syndication" when approved. In addition, three, six, and 15 clock hour seminars have been scheduled for Outreach locations such as the Torrance-Lomita Board of Realtors. At this time, CERE courses and seminars are not being offered through Community Services due to its reorginazation. Approximately 685 real estate licensees enrolled in CERE during School Year 1979/1980.

Future plans and long-range goals of the college is to offer CERE courses and seminars through the College Real Estate Department and Community Services.

The challenges facing CERE within the community colleges are:

1. Keeping up to date outlines of CERE offerings
2. Performing the amount of work required to keep the program successful (getting instructors, providing materials, and preparing the paperwork for DRE)

Cerritos College

Mr. Hugh Wilkoff, Real Estate Coordinator, indicated that his college is offering CERE courses and seminars because of the demands made by the community real estate boards.

The college does not have a preference as to courses or seminars. The college's position is to provide a balance of both. A CERE course is being offered in the Regular Real Estate Program entitled "Taxes and Exchanges." Various seminars are being offered through Community Services. There is an agreement of understanding as to procedures used to implement and maintain CERE seminars between the College Real Estate Department and Community Services. Data on the number of licensees enrolled in CERE during School Year 1979/1980 is not available at this time.

Future plans and long-range goals of the college in providing CERE are to expand the CERE program to meet needs of the community as indicated by the Real Estate Advisory Committee.

The challenge facing CERE within community colleges is the clarification of the philosophy of CERE.

Los Angeles Harbor College

Mr. Robert Wrenn, Real Estate Coordinator, indicated that his college is offering CERE courses as a service to

members of the community who need to renew their licenses.

The college prefers to offer courses instead of seminars. It is just as much work to give a person a certificate for three hours of attendance as it is for 45 hours. The college does not have the clerical help necessary to deal with large number of short courses. CERE courses offered are "Tax Aspects of Real Estate" and "Real Estate Investments." CERE courses and seminars may be offered through Community Services. There is no formal statement between Community Services and the College Real Estate Department as to CERE offerings. It is understood that Community Services won't offer any courses which compete with credit courses for continuing education attendance credit. Approximately 1,000 licensees enrolled in CERE during School Year 1979/1980.

Future Plans and long-range goals for CERE at Los Angeles Harbor College are to provide courses so long as there is a demand for them.

The challenges facing CERE in our community colleges are:

1. Funding at local colleges
2. Staying current with CERE information
3. Keeping up with the red tape

Los Angeles Southwest College

Dr. Charles Mayfield, Real Estate Coordinator, indicated that his college is offering CERE courses and

seminars to provide Real Estate Salespersons and Real Estate Brokers a resource to help them meet relicensing requirements.

The college prefers to offer both courses and seminars. The advantages of courses reduce coordination and administrative time. The disadvantages of offering courses are found in some students' inability to attend classes 90 percent of the required time. Seminars afford a shorter time frame for students per seminar; However, this increases coordination and administrative time.

In the regular Real Estate program, Los Angeles Southwest College offers one course in CERE; namely, "Tax Aspects of Real Estate" for 45 clock hours of credit. Community Services covers various three to six clock hour seminars. This interface with Community Services is working well under our agreement of understanding. The Real Estate Coordinator is responsible for selecting seminar subjects, obtaining Provider Numbers, selecting seminar outlines, selecting instructor's, verifying attendance records, and reporting to DRE by way of CCC. Community Services pays instructors, assigns classrooms, monitors the seminars, prepares certificates and maintains their permanent records. Over 250 licensees enrolled in CERE during school year 1979/1980.

Future plans and long-range goals for CERE at Los Angeles Southwest College includes the expansion of seminars to Outreach sites through Community Services. It appears that local real estate companies and real estate boards desire to

have on-site seminars.

The challenges facing CERE in our community colleges are: (1) Recordkeeping, (2) Cost of renewing certificates, and (3) Arguments against community colleges offering CERE from some private sponsors.

Santa Ana College

Ms. Evelyn Daniel, Real Estate Coordinator, indicated that her college is offering CERE courses and seminars because the State of California requires continuing education for real estate license renewal. Her college wants to provide these educational opportunities for the real estate people of the community.

The college preference is to offer courses and seminars through its regular real estate program. Some of these are entitled "Exchanges and Taxation," "Real Estate Update," "Investments," and "Law Update." Courses and seminars are not being offered through Community Services. Approximately 550 real estate licensees had enrolled in CERE during school year 1979/1980

Santa Ana College's future plans and long-range goals are to provide mostly long (26 clock hours) courses and seminars which also include college credits. The college wants to meet the needs of the real estate licensees in the District in the form of longer courses.

The challenges facing community colleges are:

1. Providing well developed courses
2. Finding authors with the expertise to develop needed courses
3. Competing with private CERE sponsors
4. Offering CERE on a non-fee basis

San Diego Community College District

Ms. Marjorie Reed, Real Estate Coordinator, indicated that her District is offering CERE courses and seminars to meet their Real Estate Advisory Committee's mandate for the real estate industry and for community college students. The District's preference is for CERE seminars to differentiate from standard college courses; however, for the fall semester, 1980, a CERE course entitled "Real Estate Investments" (45 clock hours) will be scheduled. No units of credit will be given. Courses and Seminars are not being offered through Community Services.

Approximately 250 real estate licensees enrolled in the regular Real Estate Program during School Year 1979/1980. In addition, approximately 150 real estate licensees enrolled in the Adult Education Program.

The San Diego Community College District's future plans and long-range goals are to offer at various times, segments of CERE two or three times per year. Such as CERE, 18 clock hours, _ clock hours, and 30 clock hours seminars and a 45 clock hour course.

The challenges facing community colleges in

providing CERE are:

1. Competition with realty boards who offer CERE
2. Competition with private schools offering CERE
3. Recording of attendance
4. Recordkeeping activities

CONCLUSIONS AND RECOMMENDATIONS

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Conclusions

After careful study and evaluation of the people and documentation involved for this investigative paper, the following conclusions are submitted:

1. Real Estate Coordinators have demonstrated a strong desire to offer CERE through their colleges
2. Real Estate Coordinators have incorporated CERE as part of their Real Estate Programs
3. CERE is in its infancy stage of development within CCC
4. CERE is an added responsibility for the Real Estate Coordinator
5. Administering CERE through community colleges is independent of the procedures for a regular Real Estate Program
6. CERE is a vital educational program for the real estate industry
7. Providing CERE is within the scope of duties of the Real Estate Coordinator
8. CCC is providing CERE as a cost-savings to real estate licensees
9. Real estate licensees are receiving current and updated information through CERE at CCC
10. CERE, in general, is providing consumer protection by helping licensees to learn more about the real estate business
11. Real Estate Coordinators have difficulty in:
    a. Performing the extra administrative work required to have a successful CERE program
    b. Getting funds to have various certificates made since provider numbers change yearly

c. Keeping special records and maintaining a five-year recordkeeping system

d. Finding highly qualified instructors to teach CERE courses and seminars

e. Verification of attendance

12. Real Estate Coordinators need additional recognition and financial compensation for CERE responsibilities

Recommendations

CERE is growing as a vital educational program for real estate licensees. Learned members of the real estate profession have embraced CERE to enhance their growth and development.

Therefore, it is recommended that:

1. CERE be continued past 1985 as a major part of real estate education

2. The CERE Resource Panel for CCC continue in its role to ensure quality CERE for real estate licensees

3. Real Estate Coordinators be allowed clerical helpers for recordkeeping purposes

4. Each community college's budget has provisions for Real Estate Coordinators to spend funds for special attendance certificates, related supplies, and manpower as needed

5. Real Estate Coordinators receive recognition and financial compensation for their added CERE duties

6. Real Estate Instructors become more active in professional development to teach CERE

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